

**COMMONWEALTH  
of  
VIRGINIA**

Department of Mental Health,  
Mental Retardation and  
Substance Abuse Services  
Community Support Services  
Office of Mental Health

**PACT**  
Data Entry and  
Reporting System

**INSTRUCTION MANUAL**

## **Installation Notes**

The PACT Data Entry and Reporting System is written in Microsoft® Access97®. You must have Access97 or a later version of Access installed on your system to use this software. If a newer version of Access is used, you must decide whether you would like to convert to the newer version. If you have not yet converted all PCs in your organization to Access2000, you may want to consider maintaining your database in Access97. Once converted to Access2000, that particular copy of the database will no longer work in Access97. However, you would still be able to run the Access97 version of the database using Access2000.

The database has been provided to you in split format to allow you to run it on a network.

- 1) Install the back-end of the database on a network drive.
- 2) Install the front-end of the database on each user's PC.
- 3) Open the front-end database; go to Add-Ins on the Tools menu and select Linked Table Manager.
- 4) A list of Tables will appear. Click "Select All" and then "OK".
- 5) Designate the new location of the back-end of the database.

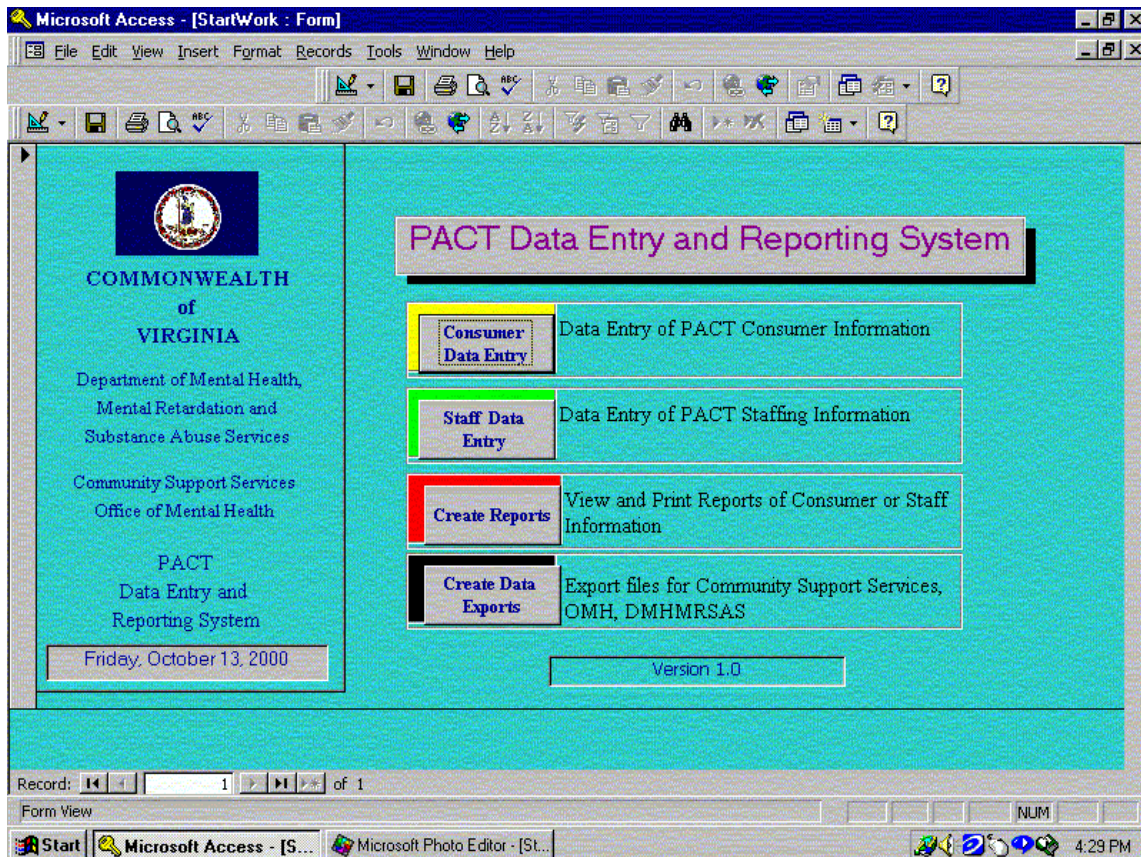
Note: The PACT Data Entry and Reporting System was designed using a screen resolution of 800 x 600. Running the program at higher screen resolutions may result in a loss of screen images.

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# PACT Data Entry and Reporting System

## Instruction Manual



This is the main data entry screen that is displayed at startup.

Select one of the command buttons –

- **Consumer Data Entry** (to add new consumers and related information);
- **Staff Data Entry** (to add new staff members, staffing positions, etc.);
- **Create Reports** (to view and print reports);
- **Create Data Exports** (to export Consumer and Staff data).



# Consumer Data Entry

This is the PACT Consumer Information screen. Consumer records are displayed in alphabetical order by last name.

Microsoft Access - [PACT Consumer Information]

File Edit View Insert Format Records Tools Window Help

Add New

ID	First Name	Last Name	DOB	Race	Sex	Admission Date	MISNo
38	Frank	Zappa	1/1/1948	Asian or Pacific	Male	7/1/2000	1234567890

StateID	Social Security #	Medicaid #	Discharge Date	Reason? Xfer To?
123456	123-45-6789	0123456780		

Diagnosis Physical Disability Housing Employment Local Hospital Criminal Justice

Diagnostic Information:

GAF Score: MH PriPop: SA PriPop: Client ID: 38  
Dx ID: 12

Primary Diagnosis: Axis: 1  
295.10

Add New/Other Dx

Record: 1 of 1

Exit Form

Record: 34 of 34

Form View

Start Inbox - Micro... Microsoft Word... Exploring - X\... Microsoft A... Microsoft Acce... 1:32 PM

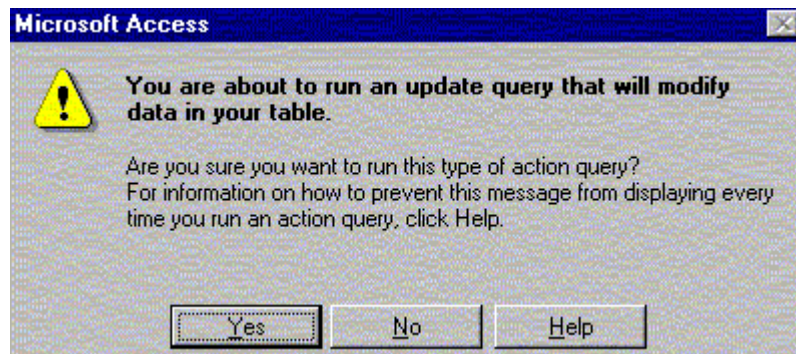
To navigate through the records, use the [Page Down] and [Page Up] keys or the command buttons in the upper left corner:



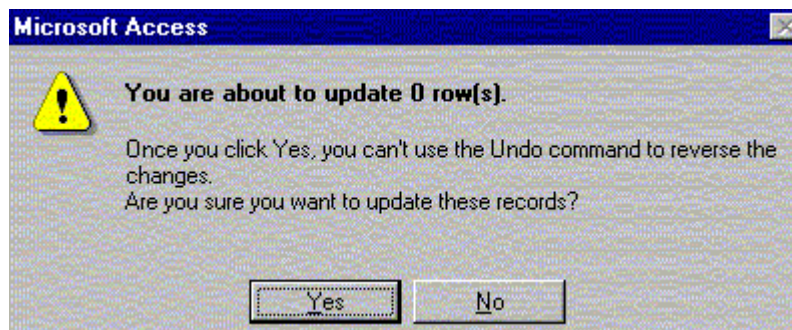
To move from one field to the next within the consumer's record, use the [Tab] key or point and click with your mouse. If you do not yet have the information required to complete a data field, simply tab over it. Data can be added or corrected at any time.

## ***- How Records Are Updated -***

*Note: If records are changed (or empty data fields are filled after the first time the record is created), Access will prompt you with the following message box:*



*Hit “Yes”, (unless of course, you made a mistake and did not mean to enter new or changed data). Access will then prompt you a second time:*



*Hit “Yes”. The number of rows you are “about to update” depends upon whether or not the record has already been exported. If not, it will equal “0 row(s)”. If it has already been exported, it will equal “1 row(s)”.*

*This applies to all records – revised consumer information, changed or updated diagnoses, housing or employment events, and so forth.*

After entering the consumer's first and last name, enter the date of birth in the "DOB" field in the format – mmddyy. *(For example, Frank's birthday is entered "010148" without the "/" key.)*

A screenshot of a software interface showing a form with several fields. The 'DOB' field is highlighted in blue and contains the text '1/1/1948'. To its right is a 'Race' field. Below the 'DOB' field is a 'Discharge Date' field, and below the 'Race' field is a 'Reason? Xfer To?' field.

Note that "Race" and "Sex" have drop-down boxes. Simply click on the correct choice:

A screenshot of a software interface showing a form with several fields. The 'DOB' field contains '1/1/1948'. The 'Race' field has a drop-down menu open, showing options: 'White/Caucasian', 'Black/African American', 'Asian or Pacific Islander', 'American Indian', 'Alaskan Native', 'Other', and 'Unknown'. The 'Sex' field has a drop-down menu open, showing 'Male'. The 'Admission Date' field is empty. The 'Discharge Date' field is empty. The 'Reason? Xfer To?' field is empty. The 'Hospital' field is empty. The 'Criminal' field is empty. The 'SA Prn Prc' field is empty. The 'Client ID' field contains '38'.

Enter the date the consumer was enrolled on the PACT Team in "Admission Date", using the same format as shown above. *(All date fields in the software use this same format.)*

Enter the consumer's "MISNo" *(the agency's Client ID #)*.

Enter the consumer's six-digit "State ID" *(also sometimes called the "regno")*.

Enter the consumer's nine-digit "Social Security Number".

Enter the consumer's "Medicaid #".

If the consumer is discharged from the PACT Team, enter the "Discharge Date". In the "Reason? Xfer To?" field, enter a brief note detailing the reason for the discharge and the service to which the consumer was transferred. *(Lengthy notes can be entered here but will not be fully visible without scrolling down.)*



## Other Consumer Related Data

Click on any of the following tabs to enter and view other information about the consumer:

Diagnosis	Physical Disability	Housing	Employment	Local Hospital	Criminal Justice
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*(Information can be entered as it is gathered over time, as long as a few simple rules are followed. These are explained in the following sections.)*

### Diagnosis

Enter the consumer's current diagnostic information, including the two-digit GAF score,

the Mental Health Priority Populations status (A, B, or C)

GAF Score:	<input type="text"/>	MH PriPop:	<input type="text"/>	SA PriPop:	<input type="text"/>
Primary Diagnosis:	<input type="text"/>	Axis:	<input type="text"/>		

and the Substance Abuse Priority Populations status (Yes or No).

GAF Score:	<input type="text"/>	MH PriPop:	<input type="text"/>	SA PriPop:	<input type="text"/>
Primary Diagnosis:	<input type="text"/>	Axis:	<input type="text"/>		

The DSM diagnosis may either be entered manually, chosen from the drop-down box, or a combination of both. *(For example, by entering the number "295" and then clicking on the drop-down box, a list of Schizophrenia related diagnoses is displayed.)*

Primary Diagnosis:	<input type="text"/>	Axis:	<input type="text"/>
<input type="text" value="295"/>			
<div>295.10 Schizophrenia, Disorganized Type 295.20 Schizophrenia, Catatonic Type 295.30 Schizophrenia, Paranoid Type 295.40 Schizophreniform Disorder, w/out good prognostic features 295.40A Schizophreniform Disorder, with good prognostic features 295.60 Schizophrenia, Residual Type 295.70 Schizoaffective Disorder, Bipolar Type 295.70A Schizoaffective Disorder, Depressive Type</div>			



A consumer may have more than one primary diagnosis. (*When entering a second primary diagnosis, leave all other fields except the “Axis” field blank. However, if you are recording a change in the consumer’s primary diagnosis, please re-enter all of the data fields.*)

## Physical Disability

Click any applicable physical disabilities:

The screenshot shows a software window titled "Physical Disability". In the top right corner, there are two input fields: "Client ID" with the value "9" and "Phys ID" with the value "5". On the left, there is a green button labeled "Physical Disability". To its right is a dropdown menu currently showing "Deafness or severe hearing loss". A list of options is displayed below the dropdown: "Deafness or severe hearing loss", "Blindness or severe visual impairment", "Nonambulation or major difficulty in ambulation", "Unable to communicate with verbal speech", "Traumatic brain injury", "Major medical condition/chronic health problem", "Other", and "None". At the bottom left, there is a "Record:" label followed by navigation icons and the number "1".

*Note: “Major medical condition/chronic health problem” is one that requires ongoing treatment.*

## Housing

First, enter the date the consumer moved into the housing type (“Housing Start Date”).

The screenshot shows a software window titled "Housing". In the top right corner, there are two input fields: "Client ID" with the value "38" and "Housing Event ID" with the value "14". Below these, there are two input fields: "Housing Start Date" with the value "07/01/00" and "End Date" which is empty. Below these fields are two dropdown menus. The first is labeled "Housing Type:" and has a list of options: "Private Residence/Household", "Shelter (includes homeless shelter)", "Boarding home", "Foster home", "Licensed home for adults (non-CSB)", "CSB residential setting", "Other residential setting", "Nursing home", "Hospital", "Local jail or correctional facility", "State correctional facility", "Other institutional setting", and "None (homeless; non-sheltered)". The second dropdown menu is labeled "Living Arrangement-with Whom:" and has a list of options: "Lives alone", "Lives with relatives (nuclear or extended family)", and "Lives with non-related persons". Below these dropdowns is a red button labeled "Add New Housing Event". Below the button is a red text message: "Make sure there is an 'End Date' for the previous housing event!". At the bottom left, there is a "Record:" label followed by navigation icons and the number "1 of 1".

Then choose the correct “Housing Type” and “Living Arrangement – With Whom”.

*Note: If the consumer moves, first enter an “End Date”, then click “Add New Housing Event”.*

## Employment

First, enter the date the consumer is categorized as unemployed or “not in labor force” or begins employment.

The screenshot shows a software interface for entering employment data. It includes fields for 'Employ Start Date' and 'Employ End Date', both with date pickers and '(mmddyy)' labels. A red button labeled 'Add New Employment Event' is present, with a red warning message below it: 'Make sure there is an "End Date" for the previous employment event!'. To the right is a list box for 'Employment Status' with the following options: Full-time (>=35hrs), Part-time (<35hrs), Unemployed, NILF- homemaker, NILF- student, NILF- retired, NILF- disabled, NILF- in institution/jail, and NILF- other (ie, not looking). Below the list box, a note states: 'F-T and P-T includes transitional and supported' and 'NILF = not in labor force'. On the far right, there are two input fields: 'Client ID' with the value '38' and 'Event ID' with the value '19'.

Then choose the correct “Employment Status”.

*Note:*

“Full-time (>=35hrs)” means the consumer is employed 35 hours or more per week, including transitional and supported employment.

“Part-time (<35hrs)” means the consumer is employed less than 35 hours per week, including transitional and supported employment.

“Unemployed” means the consumer was previously employed and is (or likely will) actively seeking employment.

“NILF” means the consumer is not seeking employment because of one of the stated reasons. “NILF – other” means the consumer is unemployed and has stopped actively seeking employment.



*Note: If the consumer's employment status changes, first enter an "Employ End Date", then click "Add New Employment Event".*

## Local Hospital

If the consumer is hospitalized (other than a state facility) for psychiatric care, enter the admission and discharge dates.

Local Hospital Use

**Add New Local Hosp**

Make sure there is a "Discharge Date" for the previous hospital admission!

Local Hospital Admit Date (mmddyy)

Local Hospital Discharge Date (mmddyy)

Client ID 38

Event ID

Number

Record: 1 of 1

## Criminal Justice

If the consumer is arrested, enter the "Arrest Date". If the arrest results in admission to jail or prison, enter the "Jail or Prison Admit Date" within the same record ("CJ Event").

Criminal Justice Involvement

Arrest Date (mmddyy)

Jail or Prison Admit Date (mmddyy)

Jail or Prison Discharge Date (mmddyy)

**Add New CJ Event**

Make sure there is a "Discharge Date" for the previous Jail/Prison admission!

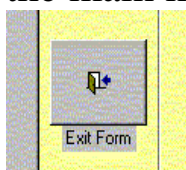
Client ID 38

Event ID

Number

Record: 1 of 1

This concludes the chapter on consumer data entry. To return to the main menu, click "Exit Form".



## Staff Data Entry

This is the PACT Staff Information Screen.

The screenshot shows the Microsoft Access application window titled "Microsoft Access - [Staff]". The interface includes a menu bar (File, Edit, View, Insert, Format, Records, Tools, Window, Help) and a toolbar with various icons. The main form area is divided into several sections:

- Top Section:** Contains fields for "PACTStaffID" (value: 506), "Staff Name", "Agency Staff ID", and "Degree". Below these are "License/Certificate1" and "License/Certificate2" fields, and an "Add New Staff" button.
- Staff Positions Section:** A sub-form titled "Staff Positions:" containing a "Staff Position" dropdown, "Appointment Start" (mmddyy), "Appointment End" (mmddyy), and "Hours per Week" (value: 0). It also includes "StaffID" (506) and "Appointment #" (3) fields, an "Add New Appointment" button, and a note: "Make sure there is an 'Appointment End' Date for the previous appointment".
- Bottom Section:** A record navigation bar showing "Record: 1 of 1" and an "Exit Form" button.

The status bar at the bottom indicates "Form View", "Record: 2 of 9", and the system clock shows "5:08 PM".

Enter the staff member's name and agency ID. Then select the highest job-related degree the staff member holds.

This close-up view shows the "Degree" dropdown menu open, displaying a list of degree options. The options are: AA, BA, BS, Other Bachelors, MA, MS, MSW, and Other Masters. The "MSW" option is currently selected and highlighted. The background shows the "PACTStaffID" field with the value 506 and the "Add New Staff" button.

*Note: If the staff member's degree is not listed, choose the most closely related one but do not exceed the correct level of education (e.g., for all Associates Degrees, select "AA")*



Select up to two job-related licenses or certificates the staff member holds.

The screenshot shows a software window with a tab labeled '506'. On the left is a red button labeled 'Add New Staff'. To its right are two green tabs labeled 'License/Certificate1' and 'License/Certificate2'. Below these is a 'Staff Position' dropdown menu. The menu is open, showing a list of professions: LPN (Licensed Practical Nurse), RN (Registered Nurse), NP (Nurse Practitioner), LCSW (Lic. Clinical Social Work - selected), LPC (Lic. Professional Counselor), OT (Occupational Therapist), APRP (Assoc. Psych Rehab Practitioner), and RPRP (Reg. Psych Rehab Practitioner). At the bottom of the menu are date fields labeled '(mmddyy)'.

## Staff Position

Select the position the staff member serves on the PACT Team.

The screenshot shows a software window with a tab labeled 'Staff Positions:'. Below the tab is a 'Staff Position' dropdown menu. The menu is open, showing a list of roles: Team Leader (selected), Psychiatrist, Lead Clinician, Lead RN, MH Professional/RN, MH Professional/SA, MH Professional/Voc, and MH Professional/Lead. To the right of the menu are date fields labeled '(mmddyy)'.

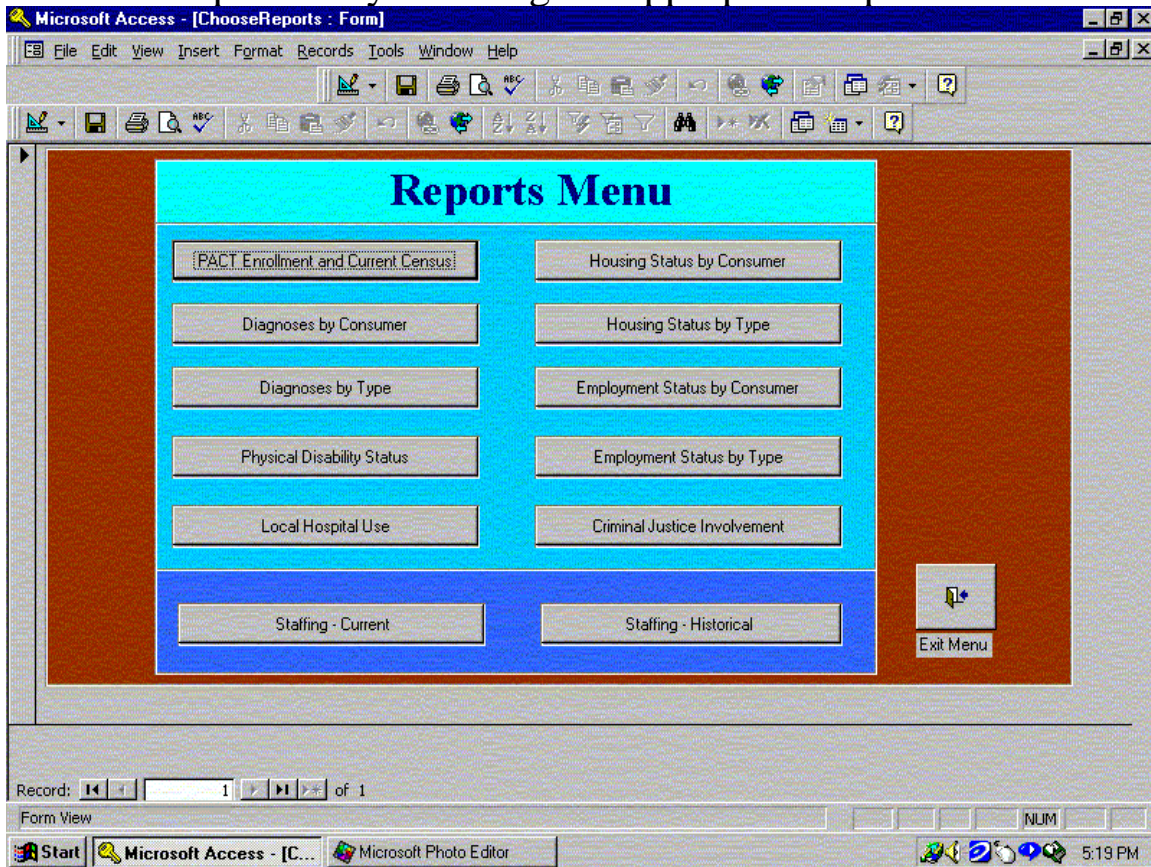
## Position Appointment

Enter the date the staff member is appointed to the position and the hours per week the staff member works in this position. *(If the agency's work week is less than 40, round full-time positions up to 40 hours per week.)*

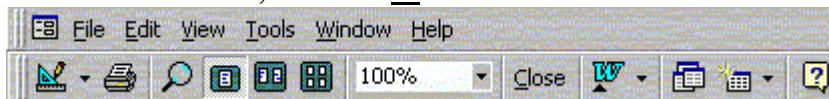
The screenshot shows a software window with three input fields: 'Appointment Start' (green header), 'Appointment End' (orange header), and 'Hours per Week' (blue header). The 'Hours per Week' field contains the number '0'. Below these fields are date fields labeled '(mmddyy)'. At the bottom is a blue button labeled 'Add New Appointment' and a note: 'Make sure there is an "Appointment End" Date for the previous appointment'.

## Create Reports

This is the Reports Menu. Consumer and Staff related data may be viewed and printed by selecting the appropriate report.



Use the Window's Toolbar when viewing and printing the report. When finished, click "Close" to return to the Reports Menu.

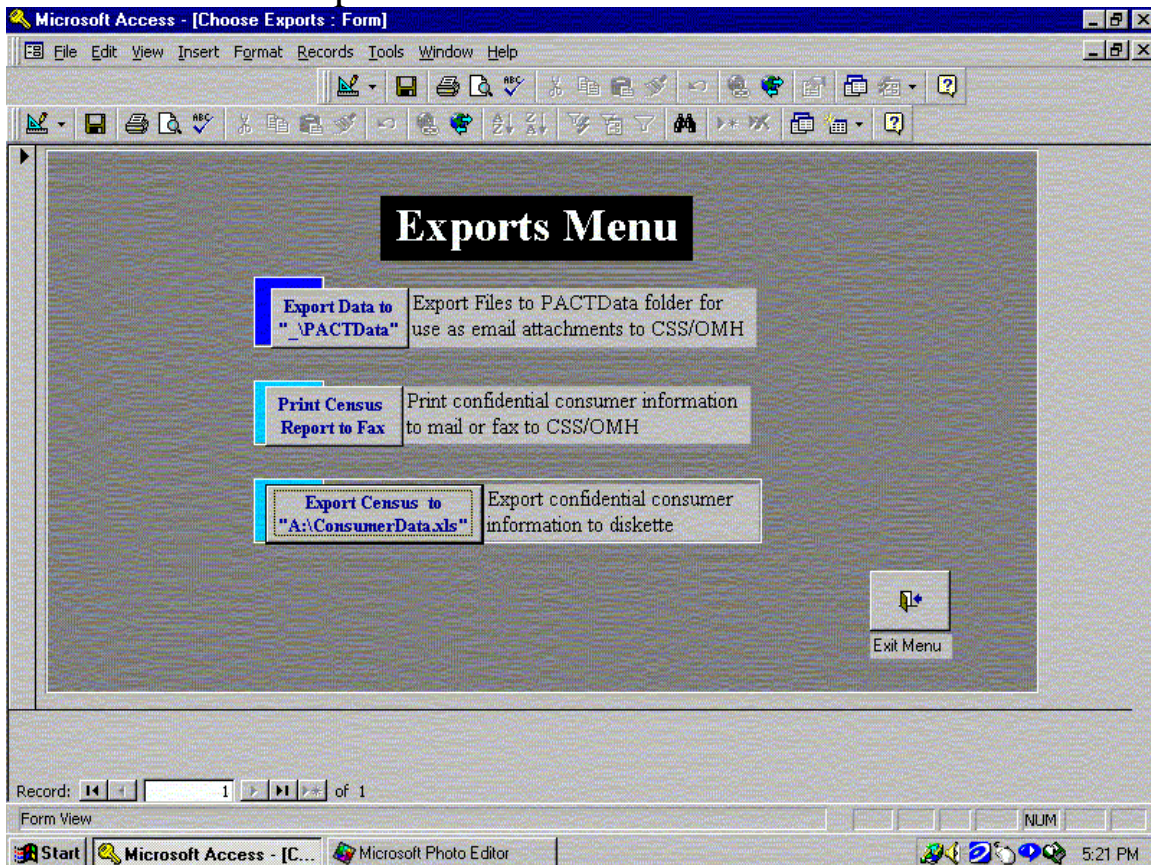


*Note: If you select the "PACT Enrollment and Current Census" report, you will be prompted to enter a report date (mmddyy).*

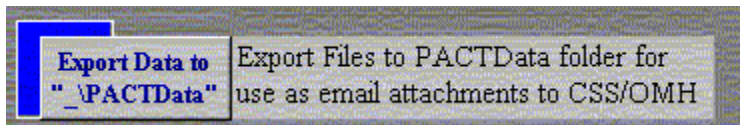


## Create Data Exports

This is the Data Exports menu.

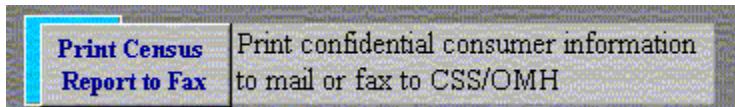


At the end of each month, select “Export Data to ‘\_\PACTData’” to create files to be sent to the Community Support Services section of the Office of Mental Health at the DMHMRSAS Central Office.



*Note: When the software is first installed, a folder is set up to hold these data files. You are required to attach these files to an email each month and send them to CSS/OMH.*

Select “Print Census Report to Fax” to print out confidential consumer information that should be faxed and not be sent by email to CSS/OMH.



*Note – this is the same as selecting the “PACT Enrollment and Current Census” report; you will be prompted to enter a report date (mmddyy).*

Select “Export Census to ‘A:\ConsumerData.xls’” to create an Excell spreadsheet on diskette of confidential consumer information as an alternative to printing and faxing.

